Philippe's Retail News: Sales Are Up. So Why Are Retailers Nervous?

November 19, 2026 · Philippe Jeanneau

Three out of four retailers had a good summer.

Fewer than half are ahead of plan for the year.

From my desk today

This morning, I sat down with the Retail Council of Canada's latest Retail Conditions Quarterly.

It's based on one-on-one interviews with mid-to-large retailers across Canada, held in early September and covering more than 5,700 stores.

The headline sounds like good news. Sales are holding. Margins are up.

But it reminded me of a conversation I had with a retailer recently.

His sales are doing well.

What worries him is everything else. Even with the U.S. midterm elections behind us, he doesn't think we're done with surprises that hit his costs.

After reading the report, I don't think he's alone.

The retailer reality

Here's the gap the report exposes.

Compared with last year, most retailers look fine. Compared with their own plan, a lot of them don't.

And a plan isn't a wish list. It's the number your rent, payroll, purchasing and cash flow were built on. When sales beat last year but miss plan, the business still feels tight.

Add the surprises:

- Freight costs that keep climbing.
- Shipments sitting longer at ports and rail yards.
- Tariffs that change with the news.
- Shoppers who are spending, but feeling less sure about tomorrow.

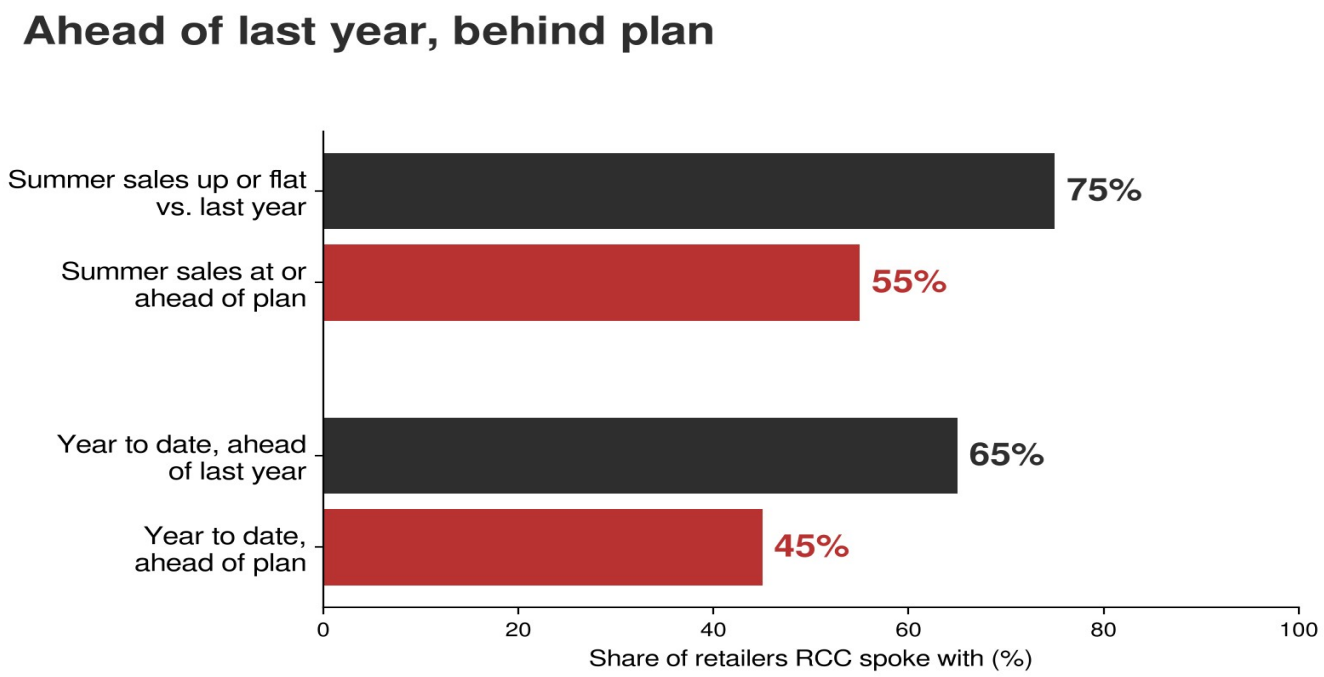
RCC's report quotes Leger: 78% of Canadians expect the new tariffs to raise prices. And the Bloomberg Nanos Canadian Confidence Index slipped to 50.38 in September, just above the line between positive and

negative sentiment.

So retailers aren't nervous about this week. They're nervous about what they can't see coming.

Behind the scenes at Randmar

Let's look at the numbers first.



Source: Retail Council of Canada, Retail Conditions Quarterly, Fall 2026.

Interviews September 8 to 11, 2026; mid-to-large retailers; non-statistical.

What it means for you: if your year feels better than last year but tighter than you expected, you're in the majority.

The good news: retailers are buying smarter.

The same report shows margins up for roughly two-thirds of retailers, and inventory turns up for 70%. At the same time, 45% are carrying less inventory. RCC sums it up as "tighter, more disciplined buying."

In other words, retailers aren't waiting for the surprises to stop. They're building businesses that can absorb them.

What you can't control, and what you can

We can't control tariffs, diesel prices or election results. Nobody can.

But when I look at the report and at what clients tell me, four pressures stand out. And inside each one, there's a part you *can* control.

Four pressures, and what you can control

The pressure	What you can control	How Randmar helps
Freight costs Every retailer RCC spoke with flagged higher shipping costs	**How many shipments you pay for**	One supplier, one invoice, one delivery; mixed pallets and pallet pricing
Slow imports About 8 days of rail dwell in Montreal, up to 13 days in Saint John	**Where your stock is waiting**	20,000+ SKUs already in Canada; 3 p.m. cut-off; 1 to 3 day delivery
Tighter buying Inventory turns are up for 70% of retailers	**How much cash sits on your shelves**	Single unit to full truck, as often as you need; drop ship the long tail
Fewer shoppers Store traffic is up for only 57% of retailers	**What each visit is worth**	About 80 brands for a fuller basket

Source: Retail Council of Canada, Retail Conditions Quarterly, Fall 2026; Randmar, 2026.

That's the real job of a distribution partner.

Not to promise there won't be surprises.

To make sure fewer of them land on you.

Three seasonal items worth putting in front of shoppers right now

When traffic is soft, every visit has to count. Here are three products in our line-up that fit what Canadians are dealing with this season:



Rakabot Plastico. Boot season is here. Wet, salty boots at the front door are a problem every Canadian household knows, and a boot rack is an easy add-on at the checkout. Keep meltwater off your floor. More boots, less clutter. And when it's time to clean, empty the bins, not the whole rack.



Manimo Sleepies. Longer nights and holiday gifting make sleep and comfort products a natural fit for the season. Its feather fidget guides children through breathing exercises to calm restlessness. It helps them regulate intense energy and emotions. And its illustrated story builds a comforting bedtime routine, so kids can wind down for a restful sleep.



Dangbei N3 Max. Holiday movie nights and big-screen gifts, without a big TV. Native 1080p, Netflix built in, and Dolby Audio from dual 6W speakers, with a Game Mode for the holiday consoles. Randmar is the exclusive importer and national distributor of Dangbei projectors in Canada.

All three can be added to the same order as the rest of your assortment. Check your Randmar account for current manufacturer rebates and opportunities on them.

My real point

Growth isn't the problem this year. Surprises are.

You can't stop them. But you can build a business that absorbs them, one cost and one order at a time.

Your quick win this week

Pull your year-to-date sales and compare them twice: once against last year, and once against your plan. Then list the three costs that grew the most this year. Those are the ones to work on first.

Your turn

Is your year tracking ahead of last year, ahead of plan, or both?

Randmar. Helping Canadian retailers sell more, every day.

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P.S. Diesel just passed $2.50 a litre. If freight is the cost that grew most for you this year, you're not alone.